

# CA Project Management Methodology Template Instructions

## Microsoft Excel® Basics

1. Knowledge of Microsoft Excel® basics is required to operate the template file. All formulas and macros are in place. However, errors can be made and work can be lost if Excel® basics are not followed. In particular, be able to enter and edit text in a field.

## Getting Started

2. If there is virus protection on the system, it could take up to 30 seconds for the file to open. If you are using Excel 2003, a dialogue box should appear asking you to enable macros. Please do so. If you do not see the dialogue box or button regarding macros close the file and check the macro security setting on your system. Click on Tools/Options/Security/Macros Security and change the setting to medium. Reopen the file, enable macros, and the file will be ready for use.

If you are using Excel 2007 – save the downloaded file as an Excel 2003 file before you open it. You may get an error message that says that some features will not be available, but just click “ok”. In Excel 2007, once the file is open, press the Options button after the “Macros have been disabled” Security Warning, then select the Enable Macros button.

3. Save a "clean," reference copy of the file on your hard drive or server. If a copy of the file is maintained on the organization's server, regularly check for updates.

4. To begin work on a new project, save a copy of the "clean" template file to your desired location with a name that is appropriate for the project you are working on.

## Toolkit Contents

5. There are two toolkits:

- Concept – consists of a template for the Concept Statement and an estimating tool
- CA-PMM Toolkit
  - A "Template Inventory and Description" worksheet
  - A "Project Information Sheet"
  - Other worksheets, each containing one of the CA-PMM templates.
- In addition, there are excerpts from the CA-PMM Toolkit to allow for multiple uses:
  - Complexity Assessment
  - Required Skills and Skill Gap Plan

- Status Report
  - Scope Change Request
6. Each worksheet is protected. You will not need to unprotect the worksheets for normal use, and we recommend that you not do so. You will need to unprotect the sheet only if you wish to make changes in the worksheet format, such as adding rows, or adding other fields to customize the form for a specific use. **However use caution if you choose to make those changes. Adding rows can interfere with the existing macros for navigation, clearing, and printing.** Save a copy and run a test to determine if the change causes changes in the functionality of the worksheet that is important to you.

Excel 2003: To unprotect the worksheet, click on Tools, Protection, Unprotect Worksheet. To protect the worksheet when you are ready, click on Tools, Protection, Protect Worksheet. You will see a dialogue box that has a list of permissions. The default is that two options are checked: Select Unlocked Cells and Edit Objects. Click OK and the worksheet will be protected.

Excel 2007: Click on the Review tab, Changes Group, then click on Unprotect Sheet. To protect the worksheet, click on the Review Tab, Changes Group, and then click on Protect Sheet.

## Workbook Navigation

7. The Template Inventory worksheet is the central navigation tool for the workbook. It contains a list of all the templates in alphabetical order. Click on the name of any template to go to its worksheet. You may also use the tabs you will find at the bottom of the worksheets to navigate throughout the workbook. These tabs are arranged by CA-PMM stages. A map of the toolkit can be found the CA-PMM Reference Manual on pages 30-34.

8. There are several navigation buttons on the left side of each worksheet:

- Top of the Page – takes the user to the top of the page
- Clear Entries – deletes text from all text fields
- Print Worksheet – prints the worksheet to the default printer. If you prefer to choose a different printer you can also use the standard Excel print function.
- Copy Responses – copies the responses for pasting in whatever application is chose
- Spell Check – checks for spelling errors
- Acronyms – takes the user directly to the Acronyms worksheet
- Inventory – takes the user directly to the Template Inventory
- The red navigation buttons moves the user to the desired section within the worksheet

## Using the Workbook

9. Start using the project workbook file by completing the Project Information Sheet. It is used to record the basic information about the project. Certain information is automatically populated to the individual templates. *[NOTE: To ensure smooth operation of the various worksheet buttons, be sure to click away from any active cell (e.g., a cell in which data has been entered), selecting another cell on the same worksheet as the button.]*

10. Cells that are automatically populated are shaded in grey.

11. To start a new line of text at a specific point in a cell, click where you want to break the line, and then press ALT+ENTER.

12. Most templates contain notes with specific instructions or helpful information. The presence of a note is indicated by a tiny red triangle in the upper right hand corner of a gray shaded field. Move the pointer to the cell with the red triangle, and the additional information will appear.

13. A number of worksheets will perform calculations based on data entered. Until data is entered, there might be unusual symbols on the worksheet (e.g., #DIV/0!). These will be replaced by computed values as data is entered in the worksheet.

14. Some worksheets also use color coding to aid in interpretation of results. For example, the "Vital Signs" worksheet uses red, yellow, and green to indicate the "health" of each sign. The appropriate colors will appear as worksheet entries are made.

15. In cases, where it is necessary to use multiple copies of individual worksheets for a project, there are individual files of the following worksheets in addition to those included in the toolkit: Concept Statement, Complexity Assessment, Status Report, and Required Skill Gap Plan. The Concept Statement is included in SIMM Section 17 B. The remaining worksheets are included in SIMM Section 17 D.

Excel 2003: To make a copy of a specific worksheet, click on the Excel® "Edit" menu and select "Move or Copy Sheet..." In the dialog box that appears, be sure to check the "Create a Copy" box and indicate where the copy should be placed. The name of the project will have to be entered manually on the copy of the worksheet.

Excel 2007: Directions for moving or copying worksheets are included in the Excel® Help function.

## Saving and Exiting

16. Excel 2003: To save your work, simply use the standard Excel® file menu.

Excel 2007: To save your work, click on the Office button and select Save.

**Tip:** the workbook will always open up to the main menu, but the individual worksheets will open where last saved.

## Printing

17. To print individual worksheet or the entire workbook, by selecting the appropriate command:

Excel 2003: Select from the Excel® print menu or from the navigation buttons on the left side of the templates.

Excel 2007: Select the Office button and click print.

Every effort has been made to ensure accurate printing, but do a "Print Preview" before printing. Settings for individual printers will vary, so small adjustments may have to be made.

## Contact Us

18. If you have any questions regarding the use of any particular template as it pertains to your project, please feel free to contact your OCIO Manager.

## Trouble Shooting –

Rarely, you may encounter error messages when opening the file. If that happens simply close the file and try again. If the error messages persist, please contact your OCIO Manager for assistance.

Problem	Instructions
Error messages on opening	In 2007, it is easy to overlook enabling macros. If you get error messages when you open the file, close it and be sure to enable macros. Also, check the macros security setting. See Item 2 in this document.
Changing headers or footers.	You may find that you want to customize the header or footer on your worksheets. Go to View, Header or Footer. You will get a dialogue box that lets you choose standard wording or you can customize.
All text not visible in cell	Unprotect sheet, place cursor on bottom of row in the row number column at the extreme left of the worksheet. Drag the cursor down to expand the row height. Protect sheet.
Need more column width.	Unprotect sheet, place cursor on the left hand border of the column in the column header row (A, B, C, etc.). Drag the cursor to the right to expand the column width.
Can't copy and paste	Copy the required text, click on the cell where you want to paste the text, place the cursor in the formula bar and paste.